



## Barnes Housing Trust Fund File Retention Policy

The Barnes Housing Trust Fund will utilize a shared drive to track the progress of work and expenditure of funds and maintain thorough client and program files for at least 3 full years following the termination date of the deed restriction.

### Electronic Project Management

1. Barnes Housing Trust Fund has established a shared drive to track the progress of projects and expenditure of funds.
2. Barnes Housing Trust Fund project staff are required to update the drive each time a client reaches a designated milestone in the process.
3. Barnes Housing Trust Fund staff will meet with the Housing Director at least monthly to review the progress of open contracts.
4. Barnes Housing Trust Fund staff will update the Housing Trust Fund Commission at each commission meeting of open contract progress.

### Recipient Files

1. Barnes Housing Trust Fund will create a file/folder for each award recipient that includes all documentation related to the recipient and the project.
2. Recipient files will be stored at the Planning Department's Division of Housing offices and may only be removed if needed in the field.
3. At the conclusion of a project, the file/folder will be reviewed by a separate Barnes Housing Trust Fund staff person to ensure completeness.
4. To the greatest extent possible, Barnes Housing Trust Fund staff will scan the complete file to create a full electronic record.

5. At all times, Barnes Housing Trust Fund staff will take appropriate measures to safeguard client information.

#### Recordkeeping

1. The Barnes Housing Trust Fund will maintain all files related to the grant for at least 3 full years following the termination date of the deed restriction.
2. Barnes Housing Trust Fund staff will conduct periodic spot audits of file keeping ensuring files are stored appropriately by recipients.